

43 YEARS OF GUIDANCE, SERVICE AND EXPERTISE

MAGA
Long Term Care Planning



www.magaltc.com | (800) 533-6242 | maga@magaltc.com



Dear Clients, Colleagues, and Friends,

Happy holidays! In addition to wishing you well, we have a few business items to share before 2018 draws to a close.

To begin, you have one final opportunity to take advantage of our 2018 long term care planning CFP®-Approved CE webinars. If you haven't done so yet or could use a refresher, it's not too late. Take one class or both; each session takes slightly under an hour and you will earn one CE credit for each webinar. Our upcoming sessions include:

LTC Combo Plans: An in-Depth Look at Asset-Based LTCI Policies

In this webinar, you'll gain a greater understanding of increasingly-popular hybrid/combo plans.

WHEN: Tuesday, December 11, 11am CT

LTC Planning: How to Choose the Best Funding Option for Clients

In this webinar, you'll learn which type of plan- traditional LTGL or hybrid/combo- works best for clients in certain situations.

WHEN: Thursday, December 13, 11am CT

Please note that advance reservations are required. Call us at 800.533.6242 or [email Jolene](mailto:jolene@magaltc.com) to reserve your spot.

Before you know it, we'll be announcing our CE webinars for 2019. In the meantime, we wish you enjoy a joyful holiday and a happy new year.

Sincerely,

Brian I. Gordon, CLTC
President
brian@magaltc.com

Peter R. Florek, CLTC
Vice President
peter@magaltc.com

P.S. If one of your 2018 goals included putting LTCI coverage in place-for yourself, a loved one, or a client-it's not too late to start the process. Simply complete our [online quote request form](#) or contact us, and we'll get the ball rolling for you.

Keeping in Touch with Insured Clients

Each fall, we touch base with all our insured clients via the MAGA Messenger, our annual print newsletter.

If your clients have obtained long term care insurance through us, they will have received this in the mail around Thanksgiving. The newsletter is packed with tips for getting the most value from an LTCI policy, as well as a reminder that we are here for our clients, especially at claim time. We hope you'll find it good reading, too - [take a look](#).



2019 LTCI Tax & Medicare Summaries Now Available

As you know, LTCI offers individuals and businesses certain tax benefits, which change from year to year. If you'd like to keep this information close at hand, request a copy of our 2019 LTCI Tax Summary.

In addition, if you have clients who are Medicare recipients, you might benefit from our 2019 Medicare Information Summary, which recaps essential Medicare benefits, maximums and provisions for the upcoming year.

A number of advisors have already asked us for copies of our annual at-a-glance guides, which they refer to throughout the year. If you'd like to have one or both summaries, call or email us and we'd be happy to email you yours.

Holiday Closings

We think everyone should enjoy some downtime with family and friends during the-holidays - and we hope that includes you. Please note that our office will be closed:

Dec. 24 at 12:00 noon, 25 & 26

Dec. 31 at noon, Jan 1 & 2

Happy holidays from the MAGA family to yours!



- Praise for MAGA -

"MAGA, Ltd. is an important resource that helps me meet the needs of my clients. I value their expertise regarding long term care insurance, their access to multiple insurers, and their commitment to do what's best for the client. I appreciate their professionalism, excellent response time, and follow-through."

My professional relationship with MAGA not only helps me better serve my clients but contributes to my success as a financial planner."

- Linda Y. Leitz, CFP, EA
President
Peace of Mind
Financial Planning, Inc.

"MAGA Ltd. has been invaluable to our practice when helping clients prepare for long term care costs. We appreciate their review of inforce policies - and we count on MAGA to keep us up-to-date. They've worked with NAPFA members for many years and service is always excellent."

Carolyn McClanahan, M.D., CFP®
Life Planning Partners, Inc.

"Thank you for helping Mrs. B. get approved to receive LTC benefits. We appreciate the support, guidance and advice you gave us. You're a pleasure to work with. Once you were involved, I knew we were in good hands."

-Debra Lapin, LCSW
Community Relations,
Belmont Village of Buffalo Grove

SERVING...

- * Consumers
- * Employers & Professional Groups
- * Financial Advisors, CPAs and Attorneys

WE WORK WITH...

highly-rated insurance carriers in order to serve our clients' best interests.

Ask us about traditional LTCI & asset based/hybrid plans.

Licensed Nationally & in California DBA MAGA Insurance Services Lic. # 0E81056

MAGA proudly supports these organizations:



www.magaltc.com | (800) 533-6242 | maga@magaltc.com